



INVITATION TO BID NO: 10-X-2220012

STATE OF ALABAMA  
DEPARTMENT OF FINANCE  
DIVISION OF PURCHASING

INVITATION TO BID

REQ. AGENCY : 010022  
DEPARTMENT OF FINANCE  
AGENCY REQ. NO. :  
T-NUMBER : TA161  
DATE ISSUED : 08/23/10  
VENDOR NO. :  
VENDOR PHONE NO. :  
SNAP REQ. NO. : 1443551  
BUYER NAME : RAY BRESSLER

FOR: HEATING AND AIR COND MAINT

BUYER PHONE NO. : (334) 242-4670-  
PURCHASING PHONE NO: (334) 242-7250

BID MUST BE RECEIVED BEFORE:  
DATE: 09/08/10 TIME: 5:00 PM

BIDS WILL BE PUBLICLY OPENED:  
DATE: 09/09/10 TIME: 10:00 AM

TO BE COMPLETED BY VENDOR

INFORMATION IN THIS SECTION SHOULD BE PROVIDED, AS APPROPRIATE. BID RESPONSE  
MUST BE IN INK OR TYPED WITH ORIGINAL SIGNATURE AND NOTARIZATION.

1. DELIVERY: CAN BE MADE \_\_\_\_\_ DAYS OR \_\_\_\_\_ WEEKS AFTER RECEIPT OF ORDER
2. TERMS: \_\_\_\_\_(DISCOUNTS ARE TAKEN WITHOUT REGARD TO DATE OF PAYMENT.)
3. PRICE VALID FOR ACCEPTANCE WITHIN \_\_\_\_\_ DAYS.
4. VENDOR QUOTATION REFERENCE NUMBER, IF ANY: \_\_\_\_\_  
(THIS NUMBER WILL APPEAR ON THE PURCHASE ORDER.)
5. E-MAIL ADDRESS: \_\_\_\_\_  
INTERNET WEBSITE: \_\_\_\_\_
6. GENERAL CONTRACTOR'S LICENSE NO: \_\_\_\_\_  
TYPE OF G.C. LICENSE: \_\_\_\_\_

\*\*\*\*\* IMPORTANT NOTE: \*\*\*\*\*

BIDDERS MUST COMPLY WITH ALL "BID RESPONSE INSTRUCTIONS" ON PAGE 2, TO INCLUDE  
ITEM 6 - COPY REQUIREMENT.

RETURN INVITATION TO BID:

US MAIL

COURIER

STATE OF ALABAMA  
DEPARTMENT OF FINANCE  
DIVISION OF PURCHASING  
P O BOX 302620  
MONTGOMERY, AL 36130-2620

STATE OF ALABAMA  
DIVISION OF PURCHASING  
RSA UNION BUILDING  
100 N. UNION ST., SUITE 192  
MONTGOMERY, AL 36104

SIGNATURE AND NOTARIZATION REQUIRED

I HAVE READ THE ENTIRE BID AND AGREE TO FURNISH EACH ITEM OFFERED AT THE PRICE QUOTED.  
I HERBY AFFIRM I HAVE NOT BEEN IN ANY AGREEMENT OR COLLUSION AMONG BIDDERS IN  
RESTRAINT OF FREEDOM OF COMPETITION BY AGREEMENT TO BID AT A FIXED PRICE OR TO  
REFRAIN FROM BIDDING.

SWORN TO AND

FEIN OR SSN

AUTHORIZED SIGNATURE (INK)

SUBSCRIBED BEFORE ME THIS

COMPANY NAME

TYPE/PRINT AUTHORIZED NAME

\_\_\_\_\_ DAY OF \_\_\_\_\_

MAIL ADDRESS

TITLE

NOTARY PUBLIC

CITY, STATE, ZIP

TOLL FREE NUMBER

TERM EXP: \_\_\_\_\_

PHONE INCLUDING AREA CODE

FAX NUMBER

STANDARD TERMS & CONDITIONS

VENDOR NAME :

VENDOR NUMBER: -

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OPEN DATE : 09/09/10 TIME: 10:00 AM

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AUTHORITY:

THE DEPARTMENT OF FINANCE CODE OF ADMINISTRATIVE PROCEDURE, CHAPTER 355-4-1 EFFECTIVE DECEMBER 20, 2001 IS INCORPORATED BY REFERENCE AND MADE A PART OF THIS DOCUMENT. TO RECEIVE A COPY CALL (334)242-7250, OR OUR WEBSITE WWW.PURCHASING.ALABAMA.GOV .

INFORMATION AND ASSISTANCE TO MINORITY AND WOMEN-OWNED BUSINESSES IN ACQUIRING M/WBE CERTIFICATION MAY BE OBTAINED FROM THE OFFICE OF MINORITY BUSINESS ENTERPRISE, 1-800-447-4191.

BID (ITB) RESPONSE INSTRUCTIONS

REV: 07/15/10

1. TO SUBMIT A RESPONSIVE BID, READ THESE INSTRUCTIONS, ALL TERMS, CONDITIONS AND SPECIFICATIONS.
2. BID ENVELOPES/PACKAGES/BOXES MUST BE IDENTIFIED ON FRONT, PREFERABLY LOWER LEFT CORNER AND BE VISIBLE WITH THE BID NUMBER AND OPENING DATE. EACH INDIVIDUAL BID (IDENTIFIED BY A UNIQUE BID NUMBER) MUST BE SUBMITTED IN A SEPARATE ENVELOPE. RESPONSES TO MULTIPLE BID NUMBERS SUBMITTED IN THE SAME ENVELOPE/COURIER PACKAGE, THAT ARE NOT IN SEPARATE ENVELOPES PROPERLY IDENTIFIED, WILL BE REJECTED. THE DIVISION OF PURCHASING DOES NOT ASSUME RESPONSIBILITY FOR LATE BIDS FOR ANY REASON INCLUDING THOSE DUE TO POSTAL, OR COURIER SERVICE. BID RESPONSES MUST BE IN THE DIVISION OF PURCHASING OFFICE PRIOR TO THE "RECEIVE DATE AND TIME" INDICATED ON THE BID.
3. BID RESPONSES (PAGE 1, PRICE SHEET AND ADDENDUMS (WHEN SIGNATURE IS REQUIRED)) MUST BE IN INK OR TYPED ON THIS DOCUMENT. OR EXACT FORMAT WITH SIGNATURES BEING HANDWRITTEN ORIGINALS IN INK (PERSON SIGNING BID, NOTARY, AND NOTARY EXPIRATION), OR THE BID WILL BE REJECTED. UNLESS INDICATED IN THE BID, ALL PRICE PAGES MUST BE COMPLETED AND RETURNED. IF AN ITEM IS NOT BEING BID, IDENTIFY IT AS NB (NO-BID). PAGES SHOULD BE SECURED. THE DIVISION OF PURCHASING DOES NOT ASSUME RESPONSIBILITY FOR MISSING PAGES. FAXED BID RESPONSES WILL NOT BE ACCEPTED.
4. THE UNIT PRICE ALWAYS GOVERNS REGARDLESS OF THE EXTENDED AMOUNT. A UNIT PRICE CHANGE ON A LINE MUST BE INITIALED BY THE PERSON SIGNING THE BID, OR THAT LINE WILL BE REJECTED. THIS INCLUDES A CROSS-OUT, STRIKE-OVER, INK-OVER, WHITE-OUT, ERASURE, OR ANY OTHER METHOD CHANGING THE PRICE.
5. THE DIVISION OF PURCHASING IS NOT RESPONSIBLE FOR MISINTERPRETATION OF DATA FAXED FROM THIS OFFICE.
6. THE DIVISION OF PURCHASING REQUIRES AN ORIGINAL AND A MINIMUM OF ONE COMPLETE EXACT COPY (TO INCLUDE SIGNATURE AND NOTARY) OF THE INVITATION-TO-BID RESPONSE. THE ORIGINAL AND THE COPY SHOULD BE SUBMITTED TOGETHER AS A BID PACKAGE. FAILURE TO MARK RESPONSES AS "ORIGINAL" AND/OR "COPY" COULD RESULT IN THE ENTIRE BID RESPONSE BEING REJECTED.
7. AN IMPROPERLY SUBMITTED BID, LATE BID, OR BID THAT IS CANCELLED ON OR BEFORE THE OPENING DATE WILL BE HELD FOR 90 DAYS AND THEN DESTROYED. THE BID MUST BE RETRIEVED DURING REGULAR WORK HOURS, MONDAY - FRIDAY, EXCEPT STATE HOLIDAYS. AFTER THE BID IS DESTROYED, THE DIVISION OF PURCHASING ASSUMES NO RESPONSIBILITY FOR THE DOCUMENT.

DISQUALIFIED/CANCELLED BID

BIDS THAT ARE IMPROPERLY SUBMITTED OR RECEIVED LATE WILL BE A RESPONSE FOR RECORD, BUT WILL NOT BE RETURNED OR A NOTIFICATION MAILED.

THE FOLLOWING IS A PARTIAL LIST WHEREBY A BID RESPONSE WILL BE DISQUALIFIED:

BID NUMBER NOT ON FACE OF ENVELOPE/COURIER PACKAGE/BOX  
RESPONSES TO MULTIPLE BID NUMBERS IN SAME ENVELOPE NOT PROPERLY IDENTIFIED  
BID RECEIVED LATE  
BID NOT SIGNED/NOT ORIGINAL SIGNATURE  
BID NOT NOTARIZED/NOT ORIGINAL SIGNATURE OF NOTARY AND/OR NO NOTARY EXPIRATION  
NOTARIZED OWN SIGNATURE  
REQUIRED INFORMATION NOT SUBMITTED WITH BID  
FAILURE TO SUBMIT THE ORIGINAL BID AND A COMPLETE EXACT COPY

CERTIFICATION PURSUANT TO ACT NO. 2006-557

ALABAMA LAW (SECTION 41-4-116, CODE OF ALABAMA 1975) PROVIDES THAT EVERY BID SUBMITTED AND CONTRACT EXECUTED SHALL CONTAIN A CERTIFICATION THAT THE VENDOR, CONTRACTOR, AND ALL OF ITS AFFILIATES THAT MAKE SALES FOR DELIVERY INTO ALABAMA OR LEASES FOR USE IN ALABAMA ARE REGISTERED, COLLECTING, AND REMITTING ALABAMA STATE AND LOCAL SALES, USE, AND/OR LEASE TAX ON ALL TAXABLE SALES AND LEASES INTO ALABAMA. BY SUBMITTING THIS BID, THE BIDDER IS HEARBY CERTIFYING THAT THEY ARE IN FULL COMPLIANCE WITH ACT NO. 2006-557, THEY ARE NOT BARRED FROM BIDDING OR ENTERING INTO A CONTRACT PURSUANT TO 41-4-116, AND ACKNOWLEDGES THAT THE AWARDING AUTHORITY MAY DECLARE THE CONTRACT VOID IF THE CERTIFICATION IS FALSE.

SPECIAL TERMS & CONDITIONS

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INVITATION TO BID

VENDOR REGISTRATION AND FEE PAYMENT ONLINE

EFFECTIVE SEPTEMBER 1, 2010, VENDORS MUST REGISTER ONLINE TO RECEIVE NOTIFICATION OF BIDS. GO TO WWW.PURCHASING.ALABAMA.GOV TO REGISTER. BIDS WILL NOT BE ACCEPTED FROM NON-REGISTERED VENDORS. A VENDOR'S REGISTRATION MUST BE MAINTAINED THROUGHOUT THE LIFE CYCLE OF AN AWARDED CONTRACT, TO INCLUDE RENEWAL PERIODS. AT THE TIME OF REGISTRATION, VENDOR MUST PAY A BIENNIAL REGISTRATION FEE. PAYMENT MUST BE MADE BY CREDIT CARD, DEBIT CARD, OR BY ELECTRONIC CHECK.

INTENT TO AWARD

EFFECTIVE MAY 1, 2008, THE STATE OF ALABAMA - DIVISION OF PURCHASING WILL ISSUE AN 'INTENT TO AWARD' BEFORE A FINAL AWARD IS MADE. THE 'INTENT TO AWARD' WILL CONTINUE FOR A PERIOD OF FIVE (5) CALENDAR DAYS, AFTER WHICH A PURCHASE ORDER WILL BE PRODUCED. UPON FINAL AWARD, ALL RIGHTS TO PROTEST ARE FORFEITED. A DETAILED EXPLANATION OF THIS PROCESS MAY BE REVIEWED IN THE ALABAMA ADMINISTRATIVE CODE - CHAPTER 355-4-1(14).

ALTERNATE BID RESPONSE

UNLESS STATED ELSEWHERE IN THIS INVITATION-TO-BID (ITB) THE STATE OF ALABAMA WILL ACCEPT AND EVALUATE ALTERNATE BID SUBMITTALS ON ANY ITB'S. ALTERNATE BID RESPONSES WILL BE EVALUATED ACCORDING TO THE REQUIREMENTS AS ALL OTHER RESPONSES TO THIS ITB.

INTERNET WEBSITE LINK'S

INTERNET AND/OR WEBSITE LINKS WILL NOT BE ACCEPTED IN BID RESPONSES AS A MEANS TO SUPPLY ANY REQUIREMENTS STATED IN THIS ITB (INVITATION-TO-BID).

PRODUCT DELIVERY, RECEIVING AND ACCEPTANCE

IN ACCORDANCE WITH THE UNIVERSAL COMMERCE CODE (CODE OF ALABAMA, TITLE 7), AFTER DELIVERY, THE STATE OF ALABAMA HAS THE RIGHT TO INSPECT ALL PRODUCTS BEFORE ACCEPTING. THE STATE WILL INSPECT PRODUCTS IN A REASONABLE TIMEFRAME. SIGNATURE ON A DELIVERY DOCUMENT DOES NOT CONSTITUTE ACCEPTANCE BY THE STATE. THE STATE WILL ACCEPT PRODUCTS ONLY AFTER SATISFACTORY INSPECTION.

SALES TAX EXEMPTION

PURSUANT TO THE CODE OF ALABAMA, 1975, TITLE 40-23-4 (A) (11), THE STATE OF ALABAMA IS EXEMPT FROM PAYING SALES TAX. AN EXEMPTION LETTER WILL BE FURNISHED UPON REQUEST.

INVOICES

INQUIRIES CONCERNING PAYMENT AFTER INVOICES HAVE BEEN SUBMITTED ARE TO BE DIRECTED TO THE RECEIVING AGENCY, NOT THE DIVISION OF PURCHASING

BID RESPONSES AND BID RESULTS

UNEVALUATED BID RESPONSES (NOT BID RESULTS) ARE AVAILABLE ON OUR WEB SITE AT WWW.PURCHASING.ALABAMA.GOV. BID RESULTS WILL BE MADE AVAILABLE FOR REVIEW IN THE DIVISION OF PURCHASING OFFICE, BUT ONLY AFTER THE BID HAS BEEN AWARDED. WE DO NOT FAX OR MAIL COPIES OF BID RESULTS. IF A VENDOR WISHES TO REVIEW BID RESULTS IN OUR OFFICE, THEY SHOULD FAX THEIR REQUEST TO REVIEW THE BID TWO DAYS IN ADVANCE TO THE "BID REVIEW CLERK" AT (334) 242-4419. BE SURE TO REFERENCE THE BID NUMBER.

FOREIGN CORPORATION - CERTIFICATE OF AUTHORITY

ALABAMA LAW PROVIDES THAT A FOREIGN CORPORATION (AN OUT-OF-STATE

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COMPANY/FIRM) MAY NOT TRANSACT BUSINESS IN THE STATE OF ALABAMA UNTIL IT OBTAINS A CERTIFICATE OF AUTHORITY FROM THE SECRETARY OF STATE. SECTION 10-2B-15.01, CODE OF ALABAMA 1975. TO OBTAIN FORMS FOR A CERTIFICATE OF AUTHORITY, CONTACT THE SECRETARY OF STATE, CORPORATIONS DIVISION, (334) 242-5324. THE CERTIFICATE OF AUTHORITY DOES NOT KEEP THE VENDOR FROM SUBMITTING A BID.

BID IDENTIFICATION

REFERENCE PAGE 2, ITEM 2. DUE TO THE POSTAL SERVICE PUTTING BAR CODE LABELS ON ENVELOPES, IT CONCEALS THE BID NUMBER AND DATE IF THE VENDOR HAS WRITTEN THEM OTHER THAN THE LOWER LEFT CORNER, THEREFORE THE BID WOULD BE REJECTED FOR NOT BEING PROPERLY IDENTIFIED.

AWARD:

EACH ITEM MUST BE PRICED SEPARATELY. HOWEVER, AN "ALL OR NONE" AWARD MAY BE MADE TO INSURE COMPATIBILITY AND/OR MAINTENANCE INTEGRITY WHERE APPLICABLE. AWARD WILL BE MADE TO THE LOWEST RESPONSIBLE BIDDER(S) MEETING ALL SPECIFICATIONS.

ASSIGNMENT OF CONTRACT:

TO ASSIGN, SUBLET OR TRANSFER ANY CONTRACT RESULTING FROM THIS SOLICITATION, THE VENDOR'S WRITTEN REQUEST MUST BE APPROVED BY THE STATE PURCHASING DIRECTOR.

DELIVERY AND INSTALLATION:

BID IS TO INCLUDE COST OF TRANSPORTATION, UNLOADING, INSTALLATION AND REMOVAL OF DEBRIS. DROP SHIPMENTS ARE NOT ACCEPTABLE. TITLE WILL CHANGE UPON RECEIPT OF SATISFACTORY DELIVERY AND INSTALLATION.

F.O.B. DESTINATION:

F.O.B. DESTINATION IS THE LOCATION WHERE MERCHANDISE IS DELIVERED AND UNLOADED ON A RECEIVING DOCK, IF AVAILABLE, TO ANY STATE OR LOCAL GOVERNMENT AGENCY AND THE CHANGE OF TITLE TAKES PLACE. THE VENDOR IS LIABLE FOR FREIGHT CHARGES, RISK OF LOSS OR DAMAGE TO THE MERCHANDISE UP TO THE DESTINATION.

FREIGHT:

BID IS F.O.B. DESTINATION. ANY FREIGHT CHARGES MUST BE INCLUDED IN THE BID PRICES.

CONTRACT PERIOD:

ESTABLISH A 12 MONTH CONTRACT WITH AN OPTION TO EXTEND FOR A SECOND, AND THIRD 12 MONTH PERIOD WITH THE SAME PRICING, TERMS AND CONDITIONS. THE SECOND AND THIRD 12 MONTH PERIOD, IF AGREED BY BOTH PARTIES, WOULD BEGIN THE DAY AFTER THE FIRST OR SECOND 12 MONTH PERIOD EXPIRES. ANY SUCCESSIVE EXTENSION MUST HAVE WRITTEN APPROVAL OF BOTH THE STATE AND VENDOR NO LATER THAN 30 DAYS PRIOR TO EXPIRATION OF THE PREVIOUS 12 MONTH PERIOD.

NON-APPROPRIATION OF FUNDS:

CONTINUATION OF ANY AGREEMENT BETWEEN THE STATE AND A BIDDER BEYOND A FISCAL YEAR IS CONTINGENT UPON CONTINUED LEGISLATIVE APPROPRIATION OF FUNDS FOR THE PURPOSE OF THIS BID AND ANY RESULTING AGREEMENT. NON-AVAILABILITY OF FUNDS AT ANY TIME SHALL CAUSE ANY AGREEMENT TO BECOME VOID AND UNENFORCEABLE AND NO LIQUIDATED DAMAGES SHALL ACCRUE TO THE STATE AS A RESULT. THE STATE WILL NOT INCUR LIABILITY BEYOND THE PAYMENT OF ACCRUED AGREEMENT PAYMENT.

PRORATION:

ANY PROVISION OF A CONTRACT RESULTING FROM THIS BID TO THE CONTRARY NOTWITHSTANDING, IN THE EVENT OF FAILURE OF THE STATE TO MAKE PAYMENT HEREUNDER AS A RESULT OF PARTIAL UNAVAILABILITY, AT THE TIME SUCH PAYMENT IS DUE, OF SUCH SUFFICIENT REVENUES OF THE STATE TO MAKE SUCH PAYMENT (PRORATION OF APPROPRIATED FUNDS FOR THE STATE HAVING BEEN DECLARED BY THE GOVERNOR PURSUANT TO SECTION 41-4-90 OF THE CODE OF

SPECIAL TERMS & CONDITIONS

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ALABAMA 1975), THE CONTRACTOR SHALL HAVE THE OPTION, IN ADDITION TO THE OTHER REMEDIES OF THE CONTRACT, OF RENEGOTIATING THE CONTRACT (EXTENDING OR CHANGING PAYMENT TERMS OR AMOUNTS) OR TERMINATING THE CONTRACT.

QUALITY OF MATERIALS AND LABOR:

MATERIALS USED THAT ARE NOT OTHERWISE SPECIFIED SHALL BE THE KIND AND QUALITY CONSISTENT WITH THE TRADE PRACTICE FOR SUCH WORK AND SHALL COMPLY WITH ALL LOCAL CODES. ALL LABOR SHALL BE WELL EXPERIENCED IN THIS TYPE WORK AND IT SHALL BE COMPLETED IN A PROFESSIONAL MANNER.

BLANK LINES:

TO EVALUATE THE BID IN AN EFFICIENT MANNER, THE VENDOR SHOULD FILL-IN ALL BLANK LINES APPLICABLE TO A SPECIFIC COMMODITY DESCRIPTION.

REQUESTED INFORMATION:

ANY ADDITIONAL INFORMATION REQUESTED FROM A VENDOR MUST BE FURNISHED WITHIN TEN (10) DAYS FROM RECEIPT OF REQUEST.

SPECIAL TERMS & CONDITIONS

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INVITATION TO BID

THE FOLLOWING CONFERENCES WILL BE HELD

CONFERENCE

LOCATION

MANDATORY SITE VISIT

DATE: 09/01/10

TIME: 9:00 AM

DEPT FINANCE/RISK MGT

CONFERENCE ROOM/ 2ND FLOOR

777 S LAWRENCE ST

MONTGOMERY AL 36104

ATTACHMENTS

VENDOR NAME :

VENDOR NUMBER: -  
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INVITATION TO BID

\*\*\*\*\*MANDATORY SITE VISIT\*\*\*\*\*

DATE: SEPTEMBER 1, 2010 TIME: 9:00 AM

LOCATION: 777 SOUTH LAWRENCE STREET  
2ND FLOOR RECEPTION AREA  
MONTGOMERY, AL

\_\_\_\_\_  
VENDOR REP. SIGNATURE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
AGENCY REP. SIGNATURE

\_\_\_\_\_  
PRINT NAME

VENDORS SHOULD BRING THE LIST OF EQUIPMENT TO THE SITE VISIT TO VERIFY ITS ACCURACY.

FAILURE TO ATTEND THE MANDATORY SITE VISIT AND OBTAIN SIGNATURES WILL RESULT IN BID REJECTION.

PRICE SHEET

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LINE NO.	COMMODITY/SERVICE DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	EXTENDED AMOUNT
UNLESS SPECIFIED OTHERWISE BELOW: SHIP TO: 010020 / 010M03 DEPARTMENT OF FINANCE/RISK MANG DIVISION OF RISK MANAGEMENT 777 S LAWRENCE ST SUITE 200 MONTGOMERY AL 36104					
00001	COMMODITY CODE: 910-36-058004 MAINTENANCE, AIR CONDITIONING PER ATTACHED TERMS AND CONDITIONS.  HEATING AND AIR CONDITIONING SERVICES TO INCLUDE ALL OF THE FOLLOWING LOCATIONS: 770 S. MCDONOUGH STREET 771 S. LAWRENCE STREET 777 S. LAWRENCE STREET  PLEASE NOTE PLEATED FILTERS WILL BE USED IN ALL AIR HANDLING UNITS THAT ARE CAPABLE OF ACCEPTING THEM.  A QUARTERLY MAINTENANCE ON HEATING AND AIR CONDITIONING SERVICE WILL INCLUDE THE FOLLOWING: 1. INSPECTION AND TUNE UP 2. REPLACE DISPOSABLE FILTERS AND CLEAN WASHABLE FILTERS 3. CHECK OPERATING PRESSURES AND CHARGE WITH REFRIGERANT(FREON) 4. CHECK THERMOSTAT ACCURACY 5. CLEAN AND INSPECT INDOOR AND OUTDOOR COILS 6. CLEAN AND DRAIN PAN AND LINES 7. OIL AND GREASE MOTORS  IN ADDITION THE BOILER AND MACHINERY EQUIPMENT SERVICE SHOULD INCLUDE THE FOLLOWING:  A. THE HEATING SEASON START-UP CONFIRM- ATION AND INSPECTION. 1. STARTING THE BOILER AND CONFIRMING THE OPERATING STATUS. 2. RECORD THE OPERATING CONDITIONS OF THE BOILER AND DISCUSS WITH MANAGE- MENT PERSONNEL. 3. CHECK ALL CONTROLS FOR PROPER OPERATION. 4. CHECK THE BURNER COMPOSITION FOR SIGNS OF EXCESSIVE SMOKE AND ADJUST IF REQUIRED. 5. ANALYZE FUEL GASES VIA A COMBUSTION ANALYSIS. 6. INSPECT AND TEST THE RELIEF VALVE FOR PROPER OPERATION. 7. CHECK THE LOW WATER-FUEL SHUTOFF 8. CHECK ALL MOTORS 9. CHECK THE ENTERING AND LEAVING HOT WATER OR STEAM TEMPERATURE 10. CHECK AND CLEAN THE FUEL FILTERS	4	QTR		

PAGE TOTAL



## PRICE SHEET

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LINE NO.	COMMODITY/SERVICE DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	EXTENDED AMOUNT
B.	THE ANNUAL EQUIPMENT SHUTDOWN INSPECTION				
1.	INSPECT THE BOILER CASINGS FOR SIGNS OF WARPING, ALIGNMENT OR OVERHEATING				
2.	INSPECTING THE SUPPORTING MEMBER FOR PROPER ALIGNMENT, SAGGING, OR SHIFTING.				
3.	WATER WALL TUBES AND ACCESSIBLE GENERATOR TUBES IN THE FIREBOX AREA SHOULD BE INSPECTED FOR ALIGNMENT, CORROSION, EROSION, BULGES AND DETERIORATE WELDS.				
4.	INSPECTING THE INTERNAL SURFACES OF DRUMS AND HEADS FOR PITTING OR SURFACE IRREGULARITIES.				
5.	BRUSHING AND INSPECTING EACH TUBE FOR PITTING, EROSION, CORROSION AND EXCESSIVE SCALE BUILDUP.				
6.	CLEANING AND INSPECTING THE SHELL BETWEEN THE TUBES AND END HOLES.				
7.	CLEANING AND REPLACING OIL NOZZLES AND FILTERS				
8.	VERIFYING THE FREE MOVEMENT OF ALL LINKAGE				
9.	CHECKING, CLEANING, OR REPLACING THE FUEL FILTERS				
10.	CHECKING THE FLAME DETECTION SYSTEM FOR PROPER OPERATION.				
11.	CHECKING ALL SAFETY AND RELIEF VALVES, THE LOW WATER FUEL SHUTOFF, WATER LEVEL CONTROLS, & THE WATER GAUGE GLASS FOR PROPER OPERATION AND CLEANING OR REPLACING IF REQUIRED.				
12.	CHECKING AND ADJUSTING ALL FUEL OIL PUMP SEALS				
13.	CHECKING THE CONDITION OF ALL COUPLINGS				
14.	CHECKING AND LUBRICATING ALL MOTORS.				
VENDOR MUST PROVIDE A 24 HOUR PHONE NUMBER THAT CAN BE USED FOR EMERGENCIES.					
INVOICES TO BE BILLED IN ARREARS.					
00002	COMMODITY CODE: 931-99-052033 LABOR, ALL TYPES, NORMAL HOURS	1	HR	_____	_____
00003	COMMODITY CODE: 931-99-052034 LABOR, ALL TYPES, OVERTIME.	1	HR	_____	_____
00004	COMMODITY CODE: 910-99-064651 PARTS & MATERIALS, REPLACEMENT	1	LT	_____	_____
MFG. LIST PRICE LESS ____% DISCOUNT					

PAGE TOTAL

BID TOTAL

**HVAC Maintenance Bid Specs**  
**Finance Department**  
**Division of Risk Management**  
**777 Office Park**  
**Montgomery, Alabama**

The Division of Risk Management (Finance Department) owns three buildings at 777 Office Park: 771 South Lawrence Street, 777 South Lawrence Street, and 770 South McDonough Street. There are no maintenance personnel on staff. The Division of Risk Management wishes to contract for periodic inspection, preventive maintenance, service and repair of HVAC systems located in these three (3) buildings. The controllers are manufactured by Distech and Lonworks. Niagara <sup>AX</sup> is the software used to diagnose equipment problems, to service the existing controls, and to integrate new equipment and systems as may be necessary.

The equipment to be serviced includes:

1. Outdoor Heat Pump Units
2. Air Handlers
3. Packaged Rooftop Units
4. Exhaust Fans
5. Hydronic Pumps for Heating Systems

An equipment breakdown with filter/belt sizes and quantity is attached.

All bidders must provide a copy of a current City of Montgomery business license.

All bidders must provide a copy of the current EPA Certifications.

All bidders should have a minimum of 5 years of commercial HVAC maintenance experience.

Bidders must furnish references from 3 current commercial customers that have been serviced multiple times within the past year. Furnish name of company, contact person, and a current phone number.

Bidders must be Niagra certified and furnish a copy of the "Certificate of Completion" from Niagra.

Bidders must be insured with a minimum of \$1,000,000 per occurrence and \$2,000,000 general aggregate general liability insurance and provide evidence of insurance with the bid.

All bidders must have Workman's Compensation insurance in accordance with the laws of the State of Alabama and furnish proof of insurance with the bid.

Contractor will invoice in arrears for each service call to include all parts, freight, labor, date of service, and a description of work performed.

Contractor will provide a detailed task list (service ticket) to the State at the time the service is completed.

There will be a mandatory site visit. Failure to attend the site visit will disqualify a bidder.

Contractor must be located within 50-100 miles and provide a response time for a non-emergency service within 24 hours. Response time for an emergency call is 1 hour. Upon award of bid, vendor must provide a 24 hour service call number.

The contract will include the following items:

- Annual and Quarterly preventive maintenance service calls.
- Labor rates for service and repairs not included in the routine preventive maintenance service calls.
- Service and repair parts and components not included in the routine preventive maintenance service calls.

#### A. Preventive Maintenance Service Calls

Contract requires a quarterly preventive maintenance service call to each building. Each service call shall include the following services:

1. Travel to and from the service location.
2. Visual and mechanical inspection of all systems, units and components at each location to determine operating condition and efficiency. Typical inspection criteria shall include but not be limited to:
  - Refrigerant charge - Annual
  - Air temperature at random discharge registers
  - Condition of heat chambers, burners, flues, etc. - Annual
  - Flame, pilot, safeties, and igniter - Annual
  - Belt condition, tension, alignment
  - Excessive vibration and/or noise
  - Safety controls - Annual
  - Proper combustion and draft
3. Preventive maintenance of all systems, units and components at each service location assure proper operation and efficiency, and maximize equipment life

while minimizing unnecessary failures and repairs. Typical preventive maintenance items shall include but not be limited to:

Cleaning:

- Outdoor Coils – Annually ~~Coils, as needed but no less than quarterly~~
- Furnish and replace all disposable filters – MERV 7 or greater rating
- Cleaning of all permanent filters
- Fan impellers and blades – inspect quarterly; tighten annually
- Pilot orifices and igniters – Clean annually
- Clean & inspect condensate drains/pans/sumps – inspect quarterly and clean annually
- Electrical contacts - annually
- Burner orifices - annually
- Boiler tubes
- Condenser housings – screws and panel intact

Lubrication:

- Motors
- Bearings
- Valve Stems – leakage quarterly
- Linkages

Alignment/Calibration/Adjustment:

- Belts, alignment and tensioning - quarterly
- Couplings
- Safety Controls - annually
- Temperature and pressure controls - annually
- Electrical connections - annually
- Mounting bolts - annually
- Clamps/fittings - annually
- Refrigerant charge - annually
- Water chemicals
- Fuel/Air ration - annually
- Gas pressures - annually
- Controls and limits - annually

Miscellaneous:

- Inspection for worn, failing or questionable parts
- Painting of housings, chases, panels, etc. to prevent corrosion
- Any preventative maintenance activities recommended by the equipment manufacturer



- Any routine service procedures recommended by the equipment manufacturer
  - Ant, insect and rodent control in and around condenser housings, electrical enclosures, etc. evidences of significant infestation must be brought to the attention of the facility administrator immediately.
4. All service and/or repair needs discovered during routine testing, inspecting and preventive maintenance operations which are not included in this contract must be brought to the attention of the facility administrator immediately. Contractor will provide the facility administrator a detailed repair proposal including comprehensive estimate for parts and labor based on contract pricing.

Note: Refrigerant and refrigerant oil, whether installed during a routine service call or during a non-routine service call, is to be invoiced as a repair/service part.

B. Labor rates

- Hourly labor rate for a licensed HVAC mechanic, regular hours (Monday-Friday, normal work hours for company such as 8-5, 7-3, 7:30-4:30)
- Hourly labor rate for a licensed HVAC mechanic, overtime hours (all other days and hours, state and federal holidays)
- Hourly labor rate for a licensed HVAC mechanic's helper, regular hours (Monday-Friday, normal work hours for company such as 8-5, 7-3, 7:30-4:30)
- Hourly labor rate for a licensed HVAC mechanic's helper, overtime hours (all other days and hours, state and federal holidays)

C. Parts and Components

- Mark-up percentage for replacement parts and components regardless of the dollar amount of cost

Model (Trane Manufacturer)	Serial #	Tag #	Phy Location of Unit (Roof, Basement, etc)	Area Served	Filter Qty	Filter Size
LPCAD06D4**H5A000000 01CAD0000	T09J19332	EBU-3A-LNW	1st Floor Mech Rm	771 North	2	20x25x2
LPCAF06D4**H5A000000 01CAC0000	T09J19324	EBU-4A-LNW	1st Floor Mech Rm	771 North	2	20x25x2
LPCAF03D4**H5B000000 01CAL0000	T09J19325	EBU-6-L	Bsmt. Mech Rm	777 Basement	1	20x25x2
LPCAF10D4**H5C000000 02EAC0000	T09J19326	AHU-3-MCD "	2nd Floor Mech Rm	770, 2nd Floor West	2 1	20x25x2 16x25x2
LPCAD06D4**H5C000000 01DAK0000	T09J19327	AHU-2-LNW	1st Floor Mech Rm	771 West, 2nd Floor	2	20x25x2
LPCAD08D4**H5D000000 01EAN0000	T09J19328	AHU-8-L "	Penthouse Mech Rm	777, 2nd Floor Southeast	1 1	20x25x22 25x25x2
LPCAD08D4**H5D000000 01DAH0000	T09J19329	EBU-1-L	Bsmt. Mech Rm	777, 1st Floor North, Underwriting	3	16x25x2
LPCAD03A4**H5B000000 01CAM0000	T09J19330	EBU-2-L	Bsmt. Mech Rm	777, Basement, Consumer Credit	1	20x25x2
LPCAD06A4**H5A000000 01CAD0000	T09J19331	EBU-3-L	Bsmt. Mech Rm	777, Basement, Consumer Credit	2	20x25x2
LPCAD08D4**H5D000000 01EAP0000	T09J19333	AHU-9-L "	Penthouse Mech Rm	777, 2nd Floor, Southwest	1 1	20x25x2 25x25x2
LPCAD08D4**H5B000000 01DAH0000	T09J19334	AHU-4-L	Basement Mech Rm	777, 1st Floor Southeast	3	16x25x2
LPCAD08D4**H5B000000 01DAH0000	T09J19335	AHU-5-L	Basement Mech Rm	777, 1st Floor Southwest	3	16x25x2
LPCAD10D4**H5B000000 02FAK0000	T09J19336	AHU-1-LNW "	1st Floor Mech Rm	771, 2nd Floor, North, Lg Conf Rm	1 2	24 x 24 x 2 16 x 24 x 2
LPCAF12D4**H5A000000 02FACA000	T09J19320	AHU-2-MCD "	1st Floor Mech Rm	770, 1st Floor East	2 1	20x25x2 16x25x2

<b>Model (Trane Manufacturer)</b>	<b>Serial #</b>	<b>Tag #</b>	<b>Phy Location of Unit (Roof, Basement, etc)</b>	<b>Area Served</b>	<b>Filter Qty</b>	<b>Filter Size</b>
LPCAD06D4**H5A00000001CAD0000	T09J19332	EBU-3A-LNW	1st Floor Mech Rm	771 North	2	20x25x2
LPCAF12D4**H5A00000002FACA000	T09J19321	AHU-4-MCD	2nd Floor Mech Rm	770, 2nd Floor East	2	16x20x2
		"			1	16x25x2
		"			2	20x20x2
		"			1	20x25x2
LPCAF10D4**H5A00000002EAC0000	T09J19322	AHU-1-MCD	1st Floor Mech Rm	770, 1st Floor West	2	16x20x2
		"			1	16x25x2
		"			2	20x20x2
		"			1	20x25x2
LPCAF08D4**H5E00000001EAL0000	T09J19323	AHU-7-L	Penthouse Mech Rm	777, 2nd Floor, Legal, Risk Mgr	1	20x25x2
		"			1	25x25x2
YHC043A3RMA**B0C00000B000***		RTU-L1	Roof	777, 2nd Floor, Center Reception Ar	2	20x25x2
TTA180C300G:15 Ton Unitary		ACCU-4-MCD	Roof	AHU-4-MCD		
2TTA3036A3000A:3 Ton Unitary		ACCU-2-L	Roof	EBU-2-L		
2TTA3036A3000A:3 Ton Unitary		ACCU-6-L	Roof	EBU-6-L		
2TTA3060A3000A:5 Ton Unitary		ACCU-2-LNW	Roof	AHU-2-LNW		
2TTA3060A3000A:5 Ton Unitary		ACCU-3-L	Roof	EBU-3-L		
2TTA3060A3000A:5 Ton Unitary		ACCU-3A-LNW	Roof	EBU-3A-LNW		



<b>Model (Trane Manufacturer)</b>	<b>Serial #</b>	<b>Tag #</b>	<b>Phy Location of Unit (Roof, Basement, etc)</b>	<b>Area Served</b>	<b>Filter Qty</b>	<b>Filter Size</b>
LP CAD06D4**H5A00000001 01CAD0000	T09J19332	EBU-3A-LNW	1st Floor Mech Rm	771 North	2	20x25x2
<b>Model (Trane Manufacturer)</b>	<b>Serial #</b>	<b>Tag #</b>	<b>Phy Location of Unit (Roof, Basement, etc)</b>	<b>Area Served</b>	<b>Filter Qty</b>	<b>Filter Size</b>
2TTA3060A3000A:5 Ton Unitary		ACCU-4A-LNW	Roof	EBU-4A-LNW		
TTA120B300:10 Ton Unitary		ACCU-1-MCD	Roof	AHU-1-MCD		
TTA180B300:15 Ton Unitary		ACCU-2-MCD	Roof	AHU-2-MCD		
TTA120B300:10 Ton Unitary		ACCU-3-MCD	Roof	AHU-3-MCD		
TTA120B300:10 Ton Unitary		ACCU-1-LNW	Roof	AHU-1-LNW		
TTA090A300:7.5 Ton Unitary		ACCU-1-L	Roof	EBU-1-L		
TTA090A300:7.5 Ton Unitary		ACCU-4-L	Roof	AHU-4-L		
TTA090A300:7.5 Ton Unitary		ACCU-5-L	Roof	AHU-5-L		
TTA090A300:7.5 Ton Unitary		ACCU-7-L	Roof	AHU-7-L		
TTA090A300:7.5 Ton Unitary		ACCU-8-L	Roof	AHU-8-L		
TTA090A300:7.5 Ton Unitary		ACCU-9-L	Roof	AHU-9-L		



<b>Model (Trane Manufacturer)</b>	<b>Serial #</b>	<b>Tag #</b>	<b>Phy Location of Unit (Roof, Basement, etc)</b>	<b>Area Served</b>	<b>Filter Qty</b>	<b>Filter Size</b>
LPCAD06D4**H5A00000001 CAD0000	T09J19332	EBU-3A-LNW	1st Floor Mech Rm	771 North	2	20x25x2
<b>Model (Mitsubishi Manufacturer)</b>	<b>Serial #</b>	<b>Tag #</b>	<b>Phy Location of Unit (Roof, Basement, etc)</b>	<b>Area Served</b>	<b>Filter Qty</b>	<b>Filter Size</b>
PUZ-A18NHA2	8ZU01168A		Roof	777, Computer Room, 2nd Floor	??	??
		HP-4		770 Bldg, Second Floor Workroom		
		HP-1		770, 1st Floor, North Workroom		
		HP-2		770, Conference Rm 1st Floor		
		HP-3		770, Room 113, 1st Floor		
<b>Model (LAARS Manufacturer)</b>	<b>Serial #</b>	<b>Tag #</b>	<b>Phy Location of Unit (Roof, Basement, etc)</b>	<b>Area Served</b>	<b>Filter Qty</b>	<b>Filter Size</b>
PNCH1000 Boiler	C09215220		2nd Floor Mech Rm	770, 2nd Floor East		
PNCH1000 Boiler	C09215221		Basement Mech Rm	777, 1st Floor Southeast		
PNCH0500 Boiler	C09214995		1st Floor Mech Rm	771 North		